

# Company Preferences - Purchasing

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## Purchasing

Under the Purchasing company preference, you will be able to manage your promised dates, purchasing from preferred vendors and drop ship Purchase Orders.

Select the appropriate selection for your Purchasing preference:

- Enable multiple promise dates.
- Limit items for purchasing to items that have the current vendor listed as a preferred vendor.
- Include unapproved purchase orders in an item's summary.
- After creating a Receiver for a drop ship PO, create a corresponding Ship Doc.
- After setting a Receiver for a drop ship PO to Received Status, create a corresponding Ship Doc.

After creating a Receiver for a linked PO, create the corresponding Ship Doc OR allocate to the

- corresponding Work Order or Repair Order.
- After creating a Receiver for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order.
- When creating a linked PO from a Sales Order, copy the Items description
- By default use the vendor's primary contact for new purchase orders
- Copy vendor notes to memo
- Default Location . The default location for all purchase orders.

The screenshot displays the OrderTime web application interface. At the top, there is a navigation bar with tabs for Home, Sales, Purchasing (selected), Production, Repairs, Warehouse, and Reports. Below the navigation bar, the page title is "Admin > Company Preferences". The main content area is titled "Company Preferences" and is divided into two sections: "Section" and "Purchasing". The "Section" section contains a list of categories: General, Activities, Doc #s, Items, Inventory, Sales, Shipping, Payments, Purchasing (selected), Receiving, Production, Lot / Serial #s, Repair Orders, Rentals, Mobile, and Mail and Calendar Integration. The "Purchasing" section contains several checkboxes and a dropdown menu. The checkboxes are: "Enable multiple promise dates" (checked), "Limit items for purchasing to items that have the current vendor listed as a preferred vendor" (unchecked), "Include unapproved purchase orders in an item's summary." (checked), "After creating a Receiver for a drop ship PO, create a corresponding Ship Doc." (unchecked), "After setting a Receiver for a drop ship PO to Received Status, create a corresponding Ship Doc." (unchecked), "After creating a Receiver for a linked PO, create the corresponding Ship Doc OR allocate to the corresponding Work Order or Repair Order." (unchecked), "After creating a Receiver for a linked PO, allocate to the corresponding Sales Order, Work Order or Repair Order." (checked), "When creating a linked PO from a Sales Order, copy the Items description" (checked), "By default use the vendor's primary contact for new purchase orders" (unchecked), "Copy vendor notes to memo" (unchecked), and "Change status to Sent after sending an email" (checked). The "Default Location" dropdown menu is currently empty. At the bottom right of the page, there are "Save" and "Reset" buttons. The footer of the page includes "Powered by NumberCruncher" and "Terms of Use | Privacy".

Click **Save** when done.

# Adding Multiple Promise Dates

- After the PO has been created, initiate the initial promise date on the PO creation page.

The screenshot shows the 'Purchase Order' creation page in the OrderTime system. The 'Vendor Uline' section includes fields for 'No.' (18), 'Date' (1/3/2024), and 'Promise Date' (02/08/2024). The 'Promise Date' field is highlighted with a red box. Below this, there are sections for 'Defaults', 'Memo & Internal Notes', and 'Custom'. The 'Defaults' section includes fields for 'Ship Method', 'Drop Ship', 'FOB', 'Class', 'Terms', and 'Bill Address'. The 'Drop Ship' field is checked, and the 'Location' is set to 'HQ'.

- To add extra promise dates, navigate to the line item editing page.
- Click the "Edit Line Item" button.

The screenshot shows the 'Purchase Order - 18' line item editing page. The 'General' section includes fields for 'Vendor Uline', 'No.', 'Date', and 'Promise Date'. The 'Promise Date' field is highlighted with a red box and contains the value '2/8/2024'. The 'Summary' section shows a 'Total Amount' of 924.00. Below this, there are tabs for 'Items', 'Details', 'Memo & Internal Notes', 'Custom', 'Dependency', 'Receivers', 'Attachments', 'Open Activities', and 'Activity History'. The 'Items' tab is selected, showing a table with columns for 'ITEM', 'DESCRIPTION', 'QUANTITY', 'UOM', 'COST', 'EXT.', and 'ACTIONS'. The table contains one row with the following data:

ITEM	DESCRIPTION	QUANTITY	UOM	COST	EXT.	ACTIONS
5-21025	18 x 18 x 10" Lightweight 32 ECT Corrugated Boxes 100 Boxes Per Bundle	4.00	Bu	231.00	924.00	[Edit] [Add] [Delete]

- Move to the Promise Dates tab.
- Click "Add" to insert additional promise dates.

OrderTime

Home Sales Purchasing Production Repairs Warehouse Reports

Purchasing > Purchase Orders > Purchase Order Line

Create New Open Full List

Recent Records

- 18
- Uline
- 17
- 16
- 348
- Stanton Dahl
- CHICKSOUPBATCH
- 2
- 4

Purchase Order Line for Purchase Order 18

Item S-21025  
Line No. 1

General Custom **Promise Dates**

Save Reset

Quantity 4

PROMISE DATE QUANTITY FILLED OPEN QUANTITY ACTIONS

2/17/2024 4 0 4.00

Add

Save Close

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Assign the amounts to the respective dates if need be thought clicking the editing button to the of the .

- Confirm the changes, and you should be all set.

OrderTime

Home Sales Purchasing Production Repairs Warehouse Reports

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Purchase Order Line for Purchase Order 18

Item S-21025  
Line No. 1

General Custom **Promise Dates**

Save Reset

Quantity 4

PROMISE DATE QUANTITY FILLED OPEN QUANTITY ACTIONS

2/17/2024 4 0 4.00

Add

Save Close

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